



BSBOPS402

# Coordinate business operational plans

Assessment 3 of 3

Case study



## Assessment Instructions

### Task overview

This assessment task is divided into four [4] tasks. Read each question carefully before typing your response in the space provided.

### Additional resources and supporting documents

To complete this assessment, you will need:

- Learning Resources
- Operational Plan
- Resource Requirement Proposal 2
- Gym Equipment Maintenance Log 2
- Acquiring Physical Resources and Services – Policy and Procedures
- Maintain Records for Operational Plans – Policies and Procedures
- Gym Equipment – Policy and Procedures
- Organisational Chart
- Sydney Staffing

## Assessment Information

### Submission

You are entitled to three [3] attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

### Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment [e.g. allowing additional time]
- the evidence gathering techniques [e.g. oral rather than written questioning, use of a scribe, modifications to equipment]

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

### Case study

For this assessment, you will play the role of Jacinta Scotts, Sydney Centre Manager [Bounce Fitness].

Bounce Fitness is made up of four fitness centres. The Head office is currently established in Cairns, Queensland. The other centres are in Brisbane [Queensland], Sydney [New South Wales] and Melbourne [Victoria].

There is a new program that has become increasingly popular in the last few months called Functional Fitness Fusion, and many gym members have expressed interest in it, but Bounce Fitness does not offer classes for this program yet. So, you and your team decided to launch this new fitness program in the Sydney Centre.

You will be required to prepare, implement and review an operational plan to update specific gym equipment.

### Operational Plan: Update Gym Equipment

**Objective:** The gym equipment needs to be updated to ensure safety and improve members' experience.

**Description:** Lately, there have been complaints and issues reported from members and employees in regard to the functionality, condition, and specifications of the equipment, and it is of paramount importance to update the gym equipment.

**Implementation:** Bounce Fitness requires the centre manager to research, find and purchase the equipment that needs to be replaced from their supplier [Commercial Fitness Equipment | Commercial Grade Gym Equipment for Sale](#). The centre manager will then need to organise the procurement, installation and monitoring of the equipment. It is the Assistant Manager's responsibility to ensure timely delivery and test the equipment once installed.

**Explanation:** After a review of the gym equipment, it was identified that the following equipment was worn out or broken and needed to be replaced:

Equipment	Specifications
3 Treadmills	Speed Range: Up to 12-15 miles per hour [MPH] Incline Range: 0-15% Running Surface: Around 20" x 60" [inches]
2 Air bikes	Resistance Levels: Adjustable magnetic or air resistance Handlebars: Moving or stationary, Console: Displays workout metrics like time, distance, calories burned, etc.
2 Elliptical Trainers	Stride Length: Between 16" to 22" inches Resistance Levels: Adjustable magnetic or air resistance Handlebars: Moving or stationary Console: Displays workout metrics like time, distance, calories burned, etc.

**Timeframe:** 2 months

**Budget:** \$30,000 for purchasing the new equipment

The Finance Department allocates \$2,000/year for the maintenance costs of the gym equipment for each centre.

## Task 1

- a) Your first task is to consult Martin Saunders, the assistant manager, to identify the resource requirements for the operational plan.  
Before the meeting, you will need to write down the requirements you identified after reading the scenario in the space below:

**Assessor instructions:** Students's responses must reflect the content in the sample answer below.

### Resource Requirements

**Physical resources (Equipment):** << Insert your response here >>

3 treadmills

2 air bikes

2 elliptical trainers

During the meeting, you will need to:

- Discuss all the equipment identified that needs to be replaced
- Clarify if there is anything else that has been identified. Ask Martin to confirm that nothing else has been reported or identified as worn out or broken.
- Ensure the language used is suitable for your audience.

The meeting must not exceed 15 minutes in duration.

**Assessor instructions:** Students must participate in a role play with one (1) other, following the instructions provided.

### Role play instructions

In this task, you will participate in a role/play meeting with one (1) other. These may be sourced using one of the following options:

- peers to who you are already working within the industry your qualification relates to.
- fellow students who will play the role of the stakeholders. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

The role play/meeting must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

If you are unable to find participants to play the role of the other team members, contact your assessor via the Discussion Forum, who will discuss options for pairing up with other students to complete this task.

### Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, providing them with the context of the role play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

Peers will need to state their name and job title at the start of the recording to inform consent.

### **Option 2: Fellow student participants**

Fellow students participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity and observation checklist so that they can prepare for the recording.

Students will need to state their name and that they are a student [as their job title] at the start of the recording to inform consent.

### **Participants' briefing instructions:**

#### **Martin Saunders, Assistant Manager**

- Listen to the student discussing the requirements.
- Explain that you discovered that one of the "Leg Press Machines" will also need to be replaced. A member reported the seat was loose and wobbly, and that affected the comfort and safety of the exercises. You researched the cost for this machine and said that it ranges between \$2,000 - \$5,000
- Be polite and speak clearly

### **Recording instructions**

Your role play must be recorded with all participants captured in a virtual room using a system such as Zoom, Skype or Teams.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying with their name and job title to inform consent.

*"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."*

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

## **ASSESSOR OBSERVATION CHECKLIST**

Students are required to upload a video of themselves and two [2] others engaged in a short meeting.

The participants must be fully briefed as outlined in the role play instructions.

The meeting should be a maximum of 15 minutes.

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY YES / NO	ASSESSOR COMMENTS
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**Task checklist**

Did the student:			
<ul style="list-style-type: none"> <li>Discuss all the equipment identified that needs to be replaced</li> </ul>			<i>The student must discuss all the requirements mentioned in the case study.</i>
<ul style="list-style-type: none"> <li>Clarify if there is anything else that has been identified. Ask Martin to confirm that nothing else has been reported or identified as worn out or broken.</li> </ul>			<i>The student must clarify if there is anything else that needs to be updated and respond to Martin's suggestion</i>
<ul style="list-style-type: none"> <li>Ensure the language used is suitable for your audience</li> </ul>			<i>The student must use language appropriate for the audience. E.g.: professional and clear tone and respectful language.</i>

b) Now, you will need to develop an operational plan for updating the gym equipment using the **Operational Plan** template provided in your resources. Instructions on how to develop the plan are included in each section of the Operational Plan template. Once you complete your plan, you will need to save it as **Update Gym Equipment - Operational Plan** and submit it.

**Assessor instructions:** Students must develop an operational plan for updating the gym equipment using the **Operational Plan** template provided in your resources. Instructions on how to assess the competency of the student's plan, as well as sample answers, are included in each section of the **Update Gym Equipment - Operational Plan - Assessor Guide**.

c) The Finance Manager has requested that you develop a Resource Requirement Proposal to be presented to all the relevant stakeholders for you to get approval for acquiring the resources needed for the successful implementation of the plan. Use the **Resource Requirement Proposal** template provided in your resources. Once you complete your proposal, you will need to save it as **Update Gym Equipment - Resource Requirement Proposal** and submit it.

**Assessor instructions:** Students must develop a Resources Requirement Proposal using the template provided. Instructions on how to assess the competency of the student's plan, as well as sample

answers, are included in each section of the **Update Gym Equipment - Resource Requirement Proposal - Assessor Guide**.

d) You will need to participate in a role-play with the Finance Manager of Bounce Fitness to present your Resource Requirement Proposal

During the meeting, you will need to:

- Discuss every part of your proposal
- Explain how you conducted your research and why you chose the specific equipment.
- Discuss how you met the budget requirements
- Ensure the language used is suitable for your audience.

The meeting must not exceed 15 minutes in duration.

**Assessor instructions:** Students must participate in a role play with two [2] others following the instructions provided.

### **Role play instructions**

In this task, you will participate in a role/play meeting with one [1] other. These may be sourced using one of the following options:

- peers to who you are already working within the industry your qualification relates to.
- fellow students who will play the role of the stakeholders. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

The role play/meeting must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

If you are unable to find participants to play the role of the other team members, contact your assessor via the Discussion Forum, who will discuss options for pairing up with other students to complete this task.

#### **Option 1: Peer participants**

Should you complete this task with your peers, you must fully brief all participants, providing them with the context of the role play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

Peers will need to state their name and job title at the start of the recording to inform consent.

#### **Option 2: Fellow student participants**

Fellow students participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity and observation checklist so that they can prepare for the recording.

Students will need to state their name and that they are a student [as their job title] at the start of the recording to inform consent.

**Participants' briefing instructions:**

**Steve Brinkley, Finance Manager**

- Listen to the student discussing the requirements.
- Approve the proposal
- Be polite and speak clearly

**Recording instructions**

Your role play must be recorded with all participants captured in a virtual room using a system such as Zoom, Skype or Teams.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying with their name and job title to inform consent.

*"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."*

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

**ASSESSOR OBSERVATION CHECKLIST**

Students are required to upload a video of themselves and one (1) other engaged in a short meeting.

The participants must be fully briefed as outlined in the role play instructions.

The meeting should be a maximum of 15 minutes.

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY YES / NO		ASSESSOR COMMENTS
<b>Task checklist</b>			
Did the student:			
<ul style="list-style-type: none"> <li>• Discuss every part of their proposal</li> </ul>			<p><i>The student must discuss every part of their proposal, including physical and human resources and space requirements</i></p>



<ul style="list-style-type: none"> <li>Explain how you conducted your research and why you chose the specific equipment.</li> </ul>				<p><i>The student must explain the process they followed to research and decide on the equipment required.</i></p>
<ul style="list-style-type: none"> <li>Discuss how you met the budget requirements</li> </ul>				<p><i>The student must discuss how they met the budgetary requirements</i></p>
<ul style="list-style-type: none"> <li>Ensure the language used is suitable for your audience.</li> </ul>				<p><i>The student must use language appropriate for the audience. E.g., professional and clear tone and respectful language.</i></p>

## Task 2

a) According to the **Acquiring Physical Resources and Services – Policy and Procedures**, after your Resource Requirement Proposal is approved, you will need to send an email to Steve Brinkley, the Finance Manager, attach your proposal and request them to acquire the physical resources for your operational plan. In your email, you must include:

- The purpose of your email
- The due date you would like the resources to be acquired by
- A reference to the attachment
- Ensure your writing style matches the purpose of your email and the audience

To write your email, use the template provided below.

[Approx. word count: 50 – 100 words]

**Assessor Instructions:** The students will need to write an email using the template below. In their email, they must cover all the points in the instructions above.

Student's wording may vary, but their responses must reflect the content in the sample answer provided below.

## Email Template

To:	<<Add name(s) and position title of main email recipients here>> Steve Brinkley, Finance Manager.
From:	<<Add your name and position title here>> Jacinta Scotts, Centre Manager
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> Acquiring Physical Resources
Attachments:	<<Add the name of any attachments here>> Resource Requirements Proposal

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

*Dear Steve,*

*I am sending you this email to inform you of the equipment that will need to be acquired for the new fitness program.*

*The resources were discussed and agreed upon during our meeting last week.*

*According to the operational plan's timeframes, we will need to have the resources by the end of this week.*

*I have attached the approved Resource Requirements Proposal with all the details about the products that need to be purchased.*

*If you have any questions, please do not hesitate to contact me.*

*Regards,*

*Jacinta Scotts*

*Centre Manager*

Regards,

<<Add your name here>>

<<Add your job position here>>

- b) According to the **Acquiring Physical Resources and Services – Policy and Procedures**, you will need to access and fill out the **Gym Equipment Maintenance Log 2** to support the efficient, cost-effective and safe use of resources, as it is your responsibility to decide how the equipment will be maintained.

**Assessor Instructions:** The students will need to fill out the Gym Equipment Maintenance Log 2. More instructions for the assessor, as well as sample answers, are included in the **Gym Equipment Maintenance Log 2 – Assessor Guide**.

### Task 3

#### Case Study

After 10 days, two of the fitness instructors approached you and informed you that the gym members stated they did not like the new elliptical machines. They noticed that sometimes the motion is uneven, and for one of them, the safety key is not working.

You also noticed that most of the time, the machines are not being used, and members are lining up to use the other elliptical machines, leading to frustration and members' dissatisfaction.

According to [Returns and Credits – Commercial Fitness Equipment](#), you have 14 days in total to take action regarding the newly purchased equipment.

- a) To determine the performance of the equipment, you will need to collate the information provided in the case study and fill out the table below. You will need to create two [2] KPIs for every piece of equipment and assess its performance based on this. One KPI needs to relate to the functionality of the equipment, and the other one to its safety.

**Assessor Instructions:** The students will need to collate the information provided in the case study and fill out the table below. They will need to create two [2] KPIs for every piece of equipment and assess its performance based on this. One KPI needs to relate to the functionality of the equipment, and the other one to its safety.

Students' wording and choice of KPIs may vary, but for the Elliptical Trainers, they will need to provide the two KPIs in the sample answer below and state they were not met.

Equipment	KPI (Key Performance indicator)	Was it met?	Suggestions for the KPIs that were not met
Treadmills	<<Insert your response here>> • Emergency Stop Feature • Belt Tracking and Alignment • Durability • Console Function	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	<<Insert your response here>>
Air bikes	<<Insert your response here>> • Emergency Stop Feature • Durability • Console Function	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	<<Insert your response here>>
Elliptical Trainers	<<Insert your response here>> • Emergency Stop Feature • Even Motion	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	<<Insert your response here>> <i>Students will either suggest the equipment to be sent back and fixed or replaced.</i>
Leg Press Machine	• Durability • Smooth Operation/movement • Ergonomic support	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	

- b) According to **Gym Equipment – Policy and Procedures**, faulty equipment will need to be replaced or fixed. According to the [Returns and Credits – Commercial Fitness Equipment](#) you have 4 days left to send back the equipment and get a refund or replace it. You will need to send an email to Martin and ask him to organise with the supplier to replace the equipment as soon as possible. In your email
- Inform him of your decision based on [Returns and Credits – Commercial Fitness Equipment](#)
  - Explain the urgency of the matter
  - Ask him to organise the replacement of both elliptical trainers
  - Ensure your writing style matches the purpose of your email and the audience

[Approx. word count: 50 – 100 words]

**Assessor Instructions:** The students will need to write an email using the template below. In their email, they must cover all the points in the instructions above.

Student's wording may vary, but their responses must reflect the content in the sample answer provided below.

## Email Template

To:	<<Add name(s) and position title of main email recipients here>> <i>Martin Saunders, Assistant Manager</i>
From:	<<Add your name and position title here>> <i>Jacinta Scotts, Centre Manager</i>
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> <i>15.04.23, 11:30 a.m.</i>
Subject:	<<Add the subject of the email here>> <i>KPIs</i>
Attachments:	<<Add the name of any attachments here>> <i>KPIs Table</i>

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

*Dear Martin,*

*After an analysis of the feedback received the [Returns and Credits – Commercial Fitness Equipment](#), I came to the conclusion that the equipment will need to be replaced. I would like to request that you organise the replacement with the supplier.*

*This matter is urgent as we only have 4 days left to return the equipment.*

*If you have any questions, please do not hesitate to contact me.*

*Regards,*

*Jacinta Scotts*

*Centre Manager*

Regards,

<<Add your name here>>

<<Add your job position here>>

c) You have been advised that the elliptical machines will take up to 4 weeks to be replaced. Without the elliptical trainers, a percentage of the gym members might stop coming or even cancel their memberships. Due to high demand and in order to ensure that you will meet the budget objectives, you would like to borrow 1 elliptical machine from another centre for these 4 weeks. According to the **Maintain Records for Operational Plans – Policies and Procedures**, you will need to update the sections Contingencies, Action Plan and Recommendations in your Update Gym Equipment - Operational Plan and save and submit it as **Updated Operational Plan**.

**Assessor Instructions:** The students will need to update the sections Contingencies, Action Plan and Recommendations in their operational plan and save and submit it as Updated Operational Plan. Instructions in regard to the updated operational plan are included in the **Update Gym Equipment - Operational Plan - Assessor Guide**.

#### Task 4

a) You will need to send an email to Steve Brinkley, the Finance Manager and Margaret House, the CEO and attach your Updated Operational Plan to gain approval for your recommendations for variation. Use the template below to write your email. In your email, you should:

- Explain the reason for your email
- Attach the Updated Operational Plan and inform them of your attachment
- Request their review and approval of the recommendations for variation presented to them.
- Ensure your writing style matches the purpose of your email and the audience

[Approx. word count: 50 – 100 words]

**Assessor Instructions:** The students will need to write an email using the template below. In their email, they must cover all the points in the instructions above.

Student's wording may vary, but their responses must reflect the content in the sample answer provided below.



## Email Template

To:	<<Add name(s) and position title of main email recipients here>> Steve Brinkley, Finance Manager Margaret House, CEO
From:	<<Add your name and position title here>> Jacinta Scotts, Centre Manager
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> Recommendations for Variation
Attachments:	<<Add the name of any attachments here>> Recommendations for Variation Presentation

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

*Dear Margaret and Steve,*

*I sending you this email to inform you that after reviewing the performance of the issues identified with the elliptical trainers, I developed recommendations for variation presentation.*

*I have attached the Updated Operational Plan to this email for your review.*

*I would like to request your review and approval of the recommendations for variation presented to you.*

*If you have any questions, please do not hesitate to contact me.*

*Regards,*

*Jacinta Scotts*

*Centre Manager*

Regards,

<<Add your name here>>

<<Add your job position here>>

### Case Study

After one month of receiving the new equipment, you conducted a survey to assess the members' and employees' satisfaction with the performance of the new equipment, and the results were great:

#### Members' results

Functionality: 98%

Safety: 100%

Durability: 86%

#### Employees' results

Functionality: 98%

Safety: 100%

Durability: 86%

Employees noticed and reported that many gym members were spending more time in the gym as a direct result of the new equipment.

Machine usage was reported to be 63% more than the old equipment.

The Gym Equipment Update Operational Plan achieved its objective.

#### Identified issues or complaints

There were no identified issues or complaints for any of the newly purchased machines

- b) You will need to send an email to Steve Brinkley, the Finance Manager and Margaret House, the CEO and inform them of the performance of the plan. In your email, you should:
- Discuss the operational performance of the new equipment
  - Inform them of the results of the survey
  - Ensure your writing style matches the purpose of your email and the audience

[Approx. word count: 100 – 150 words]

**Assessor Instructions:** The students will need to write an email using the template below. In their email, they must cover all the points in the instructions above.

Student's wording may vary, but their responses must reflect the content in the sample answer provided below.

## Email Template

To:	<<Add name(s) and position title of main email recipients here>> Steve Brinkley, Finance Manager Margaret House, CEO
From:	<<Add your name and position title here>> Jacinta Scotts, Centre Manager
CC:	<<Add names and position titles of carbon copy email recipients here>>
Date/time:	<<Add the time and date of the email here>> 15.04.23, 11:30 a.m.
Subject:	<<Add the subject of the email here>> Report regarding New Equipment
Attachments:	<<Add the name of any attachments here>>

Dear <<Add email recipient(s) name here>>,

<<Add message here>>

*Dear Steve and Laura,*

*I sending you this email to inform you that the operational performance of the new equipment is exceeding our expectations.*

*After conducting a survey, the following results were reported:*

*Members' results*

*Functionality: 98%*

*Safety: 100%*

*Durability: 86%*

*Employees' results*

*Functionality: 98%*

*Safety: 100%*

*Durability: 86%*

- Employees noticed and reported that many gym members were spending more time in the gym as a direct result of the new equipment.*
- Machine usage was reported to be 63% more than the old equipment.*

- *The Gym Equipment Update Operational Plan achieved its objective.*

*Identified issues or complaints*

*There were no identified issues or complaints for any of the newly purchased machines*

*If you have any questions or you would like to discuss further, please do not hesitate to contact me.*

*Regards,*

*Jacinta Scotts*

*Centre Manager*

Regards,

<<Add your name here>>

<<Add your job position here>>

**Assessment checklist:**

Students must have completed all questions within this assessment before submitting. This includes:

1	<b>Task 1</b> a) Role play b) Update Gym equipment - Operational Plan c) Resource Requirements Proposal d) Role Play Presentation	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2	<b>Task 2</b> a) Email b) Equipment Use and Maintenance Log	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3	<b>Task 3</b> a) KPIs table b) Email c) Updated Operational Plan	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
4	<b>Task 4</b> a) Email b) Email	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>



**Congratulations you have reached the end of Assessment 3!**

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